TOUR DE PROFIT

BUSINESS TUNE-UP ASSESSMENT

DETERMINE WHERE
TO **PRIORITIZE**
YOUR **EFFORTS**

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TOUR de PROFIT

*Determine where to **prioritize your efforts.***

Please read through all the questions, consider how you feel or what you think about each one, then go back and follow the steps.

Step 1.

Rate your readiness on each question on a scale of 1 (low) to 5 (high).

Step 2.

Identify the 3 MOST CRITICAL statements for you right now.

THE RIDER - PERSONAL MINDSET

I am excited to find, or re-find, my passion and get my heart and mind back focused on really enjoying running and building the business again.

☐ **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐ **Most Critical**

I work "ON" my business rather than "IN" it on a regular basis. I am focused on creating a systems-dependent business rather than a people-dependent business.

☐ **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐ **Most Critical**

I have a plan to get myself the freedom of more time away from the business, still knowing it is growing and creating more, and more, profits without me there.

☐ **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐ **Most Critical**

HANDLEBARS - VISION & LEADERSHIP

I have written and shared my personal story so that my team knows and understands WHY the success of this business is so important.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I have a clear and compelling vision for the future of my company and the future of my life. I have a developed complete and powerful set of written personal and business goals to help me achieve my vision and my life's aim.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I have defined and shared the Performance Standards that I will expect and demand from anyone who works with me to serve my customers.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

FRAME - STRUCTURE & ORGANIZATION

I have an organizational chart that reflects the functions in my business in 3 years which includes the future roles I envision in the business and the sequence in which I will fill the new positions.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I have a written position contract (Responsibilities and Accountability) for every position on my organization chart. Everyone has signed off on his or her position contract.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I have established a reliable and repeatable system of Accountability that applies to everyone on our team.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I have identified and implemented a Continuous Improvement Methodology that will allow us to consistently make incremental improvements in every area of our business.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

FRONT WHEEL - WINNING THE NEW CUSTOMERS

I have identified a detailed description of the attributes of our ideal customer. It is documented and is being used to help define our marketing messages and our sales processes.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I have identified multiple marketing strategies (at least 5-7) that are effective ways to generate leads and prospects for our products and services. I track and measure the success of each marketing strategy we use.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I use and follow a marketing plan to help us predictably increase new customers, revenues, and profits.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I have established an effective sales approach that gets results. I measure my lead conversion rate and know it is improving consistently.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I have a motivated, professional, and profitable sales force that creates strong sales conversion rates and increasing average sale values.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

BACK WHEEL - SERVING CUSTOMERS

I have a consistent, repeatable and well-documented process for the delivery of my products and services to my customers. I am efficient and effective and deliver far superior products and services than my best competition.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I have established delivery processes that can be adjusted to meet the demands for our products and services. Our business can be efficient and profitable in both high-demand and low-demand situations.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I am training my team so they deliver superior levels of customer service to create raving fans and repeat buyers time after time.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I measure how much our customers delight in their experience doing business with my company.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

BRAKES - KPIs & FINANCIAL CONTROLS

I have a system for controlling, managing and reporting my business finances. I run my business with a budget. I use a cash flow forecast to anticipate my future cash needs and availability. I know my margins, cost and real company profitability.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I know the Key Performance Indicators (KPIs) that drive my business results.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I use a metrics dashboard to help me predict my business results. I track and measure critical activities on a weekly basis and reflect them in graphic form so that everyone in my business can see our results and progress.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I have a structured plan for the use of my profits — to re-invest some back into my business, to share some with my team, and to give some to charity or back to the community.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

SEAT - BUILDING A WINNING TEAM

I have established my non-negotiables and share them regularly with our team so that everyone is aware of the internal culture I expect, dreamed and hold people accountable to maintain.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ **Most Critical**

I use a recruiting system that is both efficient and effective to help us find and add the best fit, highly motivated and skilled people to our team.

☐ **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐ **Most Critical**

I have developed and implemented a solid communications plan so that everyone on our team is regularly and fully informed about our business.

☐ **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐ **Most Critical**

I have established and communicated our rewards and recognition programs and they motivate our team members to give us their best efforts every day.

☐ **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐ **Most Critical**

I am developing and building strong leaders within my business and am working on my succession plan so I can replace myself with the right people, at the right time and allow them to ultimately run my business for me.

☐ **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5** ☐ **Most Critical**

CONGRATULATIONS!

The first step is to be aware of where improvements need to be made.
You're well on your way to achieving the business results you desire.
I am excited about the possibilities that lie ahead for you.

Rich Allen

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